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Introduction

Reports can be generated at any time in SVRS. At the time a report is run, the information is retrieved directly from SVRS.

The two main ways to generate a report from SVRS are:

1. To use the search function and resulting data grid, available in most SVRS nodes;
2. To use the Reports node to generate a report.

Key Terms

Filtering is a way of controlling the data that appears on a report. Only the records that match the filter criteria will show up on the report or search. For example, for a report which should return only active voters, users can create a filter to select only the records for which the voter status is active.

Sorting is a way of ordering how records are listed on a report or returned from a search.

Data Grid is a place where information appears from a data search in SVRS.

Data Grid Reports are created from data search results in many of the SVRS nodes. Data search results can be filtered, sorted, grouped and formatted, then exported or printed.

Ad Hoc Report is the name of a standard report as defined in SVRS. Within each report category there is a list of standard Reports available to print.

Report Category is an organizational grouping of ad hoc reports, as defined in SVRS. The categories available are:

- **Absentee**
- **Applications (Voter Registration)**
- **Contacts**
- **Elections**
- **My Saved Reports (reports saved by a user)**
- **Poll Worker**
- **Polling Place**
- **Saved Reports (reports saved by a user, available for all users in their jurisdiction)**
- **System Reports (used by Administration only)**
- **Voter**

Modify Layout is a feature within the **Print Reports** Quick Task. It is a way to adjust the arrangement of columns on an ad hoc report. The modified layout can be saved either in the **My Saved** or **Saved Reports Category** for future use.

Create Reports is a quick task available from the **Reports** node. It allows users to create new reports that are loosely based on existing ad hoc reports. These reports give the user more flexibility because they may change the formatting of the original report. The modified layout can be saved either in the **My Saved** or **Saved Reports Category** for future use.

The Scheduler is found under **Print Options**. When the SVRS system is busy, any report or mailing can be redirected to the Scheduler to run when resources are available. Reports processed through the Scheduler will always be written to the **My Documents** folder on the server.

Data Grid Reports – Customizing, Formatting and Printing Reports from the Search Grid



Data Grid Reports can be created from any set of data that appears in a search results grid in SVRS. The only limiting factor is that the search results grid can hold a maximum of 1000 records. Any search that results in more than 1000 records will not display all of the desired records. It may be possible to further filter your report, to limit the number of records to less than 1000. This will allow you to create a report with 2,000 or 3,000 records, by cutting and pasting multiple searches from the data grid.

The Voter Transfers Data Grid Report

- From the **Main Menu**, expand (+) the **Voter** node and click on the **Voter Transfers** node (the same procedure will work from other nodes as well).
- Enter in the desired criteria and click **Search**. In this case, enter your own municipality into the **From Jurisdiction** box and, if desired, a range of dates in the **Transfer App Date Between** dropdown.

The screenshot shows the AESM application interface. On the left is a 'Menu' tree with 'Voter' expanded and 'Voter Transfers' selected. The main window has search criteria: 'From Jurisdiction' set to 'CITY OF BOSCOBEL' and 'Transfer App Date Between' set to a range. The 'Search' button is circled in red. Below the search criteria, it says 'Records Returned: 81'. A data grid is displayed with columns: Transfer Status, Transfer Status Reason, From Jurisdiction, To Jurisdiction, Transfer App Date, and Approval Deadline. The grid contains 81 rows of data, all with 'Approved' status.

- Customize the view on the data grid to display only the columns that are to be included on the data grid report.

- Right click on the column header row to display the menu. Select **Runtime Column Customization**. This will display a box listing all the data columns **NOT** currently displayed. You may drag column headers from this box to display them in the data grid, or drag column headers from the grid to the **Runtime Column Customization** box to hide that column.

This screenshot shows the 'Runtime Column Customization' menu open over the data grid. The menu includes options like 'Sort Ascending', 'Sort Descending', 'Group By This Field', 'Group By Box', 'Runtime Column Customization', and 'Best Fit'. The 'Runtime Column Customization' option is highlighted. A red arrow points from the text in the previous block to this menu. Another red arrow points from the 'Customization' box to the 'Runtime Column Customization' menu item. The 'Customization' box is visible on the right side of the grid, listing columns that are not currently displayed, including 'JurisdictionID', 'AddressRangeID', 'SignatureDocu...', 'BatchID', 'LinkedVoterID', and 'DistrictCombID'.



Other helpful menu choices are **Best Fit** and **Best Fit (all columns)**. These will widen the column(s) so you can see all of the data.

- b. If desired, add a column to the data grid. Search the **Runtime Column Customization** box for the name of the column you wish to add, then drag and drop it into the data grid. In the example below, we are adding the **AppSourceCode** column to the grid. The black box indicates where the new column will appear.

Drag a column header here to group by that column

Transfer Status	Transfer Status Reason	From Jurisdiction	To Jurisdiction	Transfer App Date	Approval Deadline
Approved	Transfer Approved	CITY OF BOSCOBEL	VILLAGE OF HILL	2/26/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF MARIETTA	11/19/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF RICHMOND	12/4/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF LA CRUZE	12/2/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF MADISON	10/27/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF MADISON	10/18/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF WATKINS	4/11/2007	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF PRAIRIE	10/10/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF SCOTCH	9/29/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF SCOTCH	4/4/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF LA CRUZE	3/10/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF BLACKSBURG	2/19/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF WHITEHALL	4/3/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF FENNEL	12/4/2006	
Approved	Transfer Approved	CITY OF BOSCOBEL	VILLAGE OF DEER	9/10/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF PLATT	10/12/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF OAK	11/24/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF PLATT	11/26/2007	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF MARIETTA	12/1/2006	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF MARIETTA	12/1/2006	
Approved	Transfer Approved	CITY OF BOSCOBEL	TOWN OF WOOD	11/30/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF WHITEHALL	10/14/2008	
Approved	Transfer Approved	CITY OF BOSCOBEL	CITY OF FALLS	11/25/2008	

81 Record(s) returned

- c. To remove a field, drag and drop the column header to the **Runtime Column Customization** box. In the example below, all but 5 columns have been removed.

AESM

File Edit View Tools Window Help

Menu Shortcuts Quick Tasks

Active Jurisdiction: CITY OF BOSCOBEL - 222

Transfer App Date Between: [] and [] From Jurisdiction: CITY OF BOSCOBEL To Jurisdiction: []

Transfer Status: [] First Name: [] Last Name: [] Voter Reg Num: []

Records Returned: 81

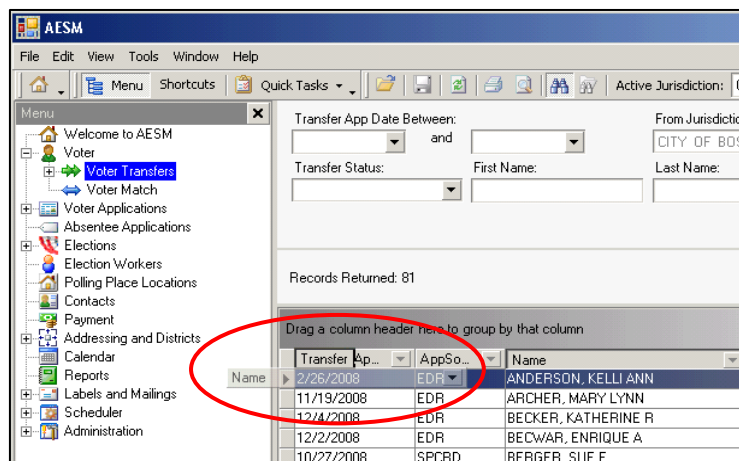
Search Clear


Drag a column header here to group by that column

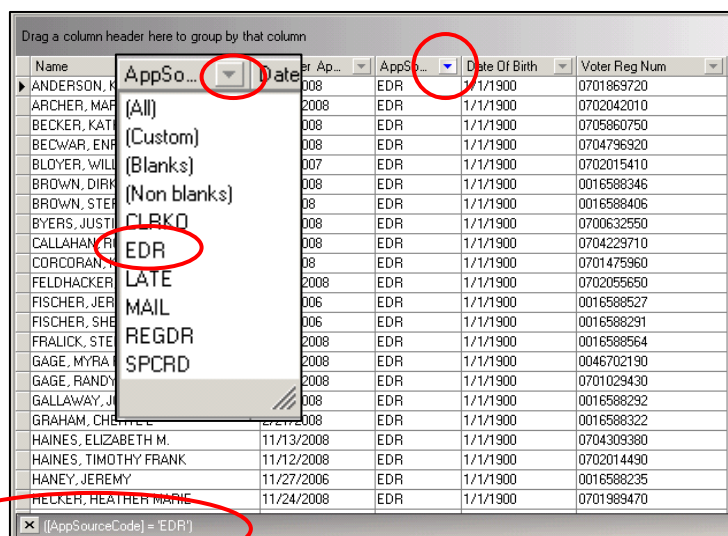
Transfer App Date	AppSourceCode	Name	Date Of Birth	Voter Reg Num
4/16/2009	EDR	WRIGHT, STEVEN OWEN	1/1/1900	0016588279
4/9/2009	EDR	NICHOLSON-JONES, JACQUELINE P	1/1/1900	0016588594
12/15/2008	EDR	MARK, JEFFREY HILL	1/1/1900	0701991930
12/4/2008	EDR	BECKER, KATHERINE R	1/1/1900	0705860750
12/4/2008	EDR	LORENZ, STEVEN J	1/1/1900	0018232345
12/2/2008	EDR	BECKWAR, ENRIQUE A	1/1/1900	0704796320
11/30/2008	EDR	FRALICK, STEPHEN M	1/1/1900	0016588564
11/25/2008	EDR	GAGE, MYRA R	1/1/1900	0046702190
11/25/2008	EDR	GAGE, RANDY JOSEPH	1/1/1900	0701029430
11/25/2008	EDR	OLSON, MICHELLE LYNN	1/1/1900	0031821036

4. Arrange the data so it is displayed in the order you desire. This means you may need to filter and sort the data, or rearrange the order of columns.

- a) To change the order of columns, click on a column header and drag and drop into its new position. (In the example below, the **Name** column is being moved to the first position.) The black box indicates where your column will be placed.

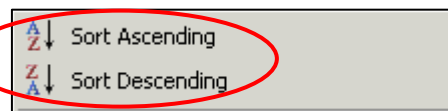


- b) If you wish to limit your results further, but are unable to use the search fields in the upper part of the screen, you may be able to filter your results in the grid. To do this, click the square button  at the right hand side of the column header. This will display a list of all of the available values in that column. In the example below, the column **AppSourceCode** has been filtered by selecting **EDR**, so only Election Day Registrations are displayed in the grid.



Note: When a filter is applied, the square button at the right of the column header turns blue. The filter also appears at the bottom of the data grid.

- c) If you want to sort your results, you can right click on the column header of the desired column and select **Sort Ascending** or **Sort Descending** from the menu. You may also left-click on the column header. Clicking once sorts the column in ascending order, and an upwards-pointing triangle appears on the column header. Clicking again sorts the column in descending order, and a downwards-pointing triangle appears on the column header.



Transfer...	Transfer...
10/9/2006	4/16/2009
11/13/2006	4/9/2009
11/27/2006	12/15/2008
11/28/2006	12/4/2008
12/1/2006	12/4/2008
12/1/2006	12/2/2008
12/4/2006	11/30/2008
12/26/2006	11/25/2008
12/26/2006	

At the right, the **Transfer App Date** column is sorted in ascending and descending order. Ascending order puts dates from oldest to most recent, and descending does the opposite.



Note: It is possible to sort by more than one criterion. In the example below, the **Home_StreetName** column has been added to the **Voter** data grid from the **Runtime Column Customization** box. Then the user clicked on the **Home_StreetName** column to sort by the street name. A secondary sort was applied by holding down the **Shift** key and clicking on the **Address** column header. Now the records are in order by street name, then street number. The **Home_StreetName** field can be removed from the data grid by dragging and dropping it into the **Runtime Column Customization** box, while retaining the sort.

Name	Home_StreetName	Address
FARRELL, MARK JAMES	ADAMS	105 ADAMS ST
KNOBLE, DOUGLAS J	ADAMS	106 ADAMS ST
KNOBLE, CYNTHIA JANE	ADAMS	106 ADAMS ST
STITZER, WENDI ANNE	ADAMS	107 ADAMS ST
RAY, JUDY MARIE	ADAMS	208 ADAMS ST
RAY, WILLARD W	ADAMS	208 ADAMS ST

5. To format the report:

- Select **Preview** from the **File** menu, or click the **Preview** button on the top menu bar.



- In the **Preview** screen, select **Page Setup** from the **File** menu.

The screenshot shows the AESM application window. The **File** menu is open, and the **Preview** option is highlighted. Below it, the **Preview** window is open, and the **Page Setup** option is highlighted in the **File** menu. The **Page Setup** dialog box is open, showing the following settings:

- Paper:** Size: Letter, Source: Automatically Select
- Orientation:** Landscape (selected)
- Margins (inches):** Left: 1, Right: 1, Top: 1, Bottom: 1

The background shows a data grid with columns for Name, Home_StreetName, and Address. The data is sorted by Home_StreetName and then Address.


- Adjust the **Paper Size**, **Source** and **Margins** if necessary. Select **Landscape** if you need more space to display your data.
- Click the **Printer** button to select a printer or set other options particular to your printer. Click **OK** to return to the **Preview** screen.

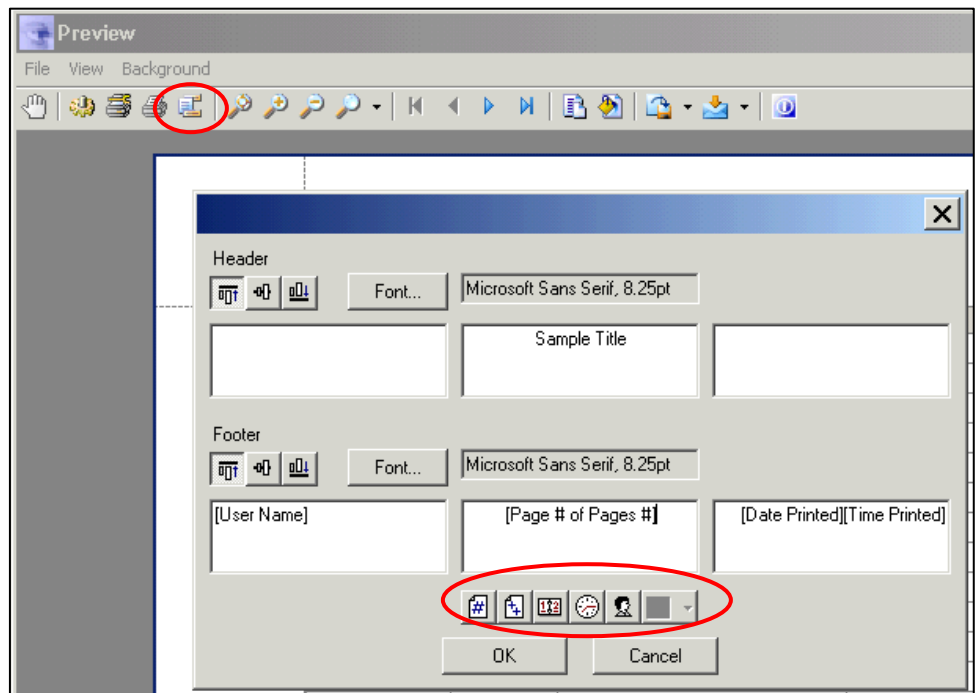


Note: Even if you change to Landscape, the data will not automatically adjust to the larger page size. You must click on the dotted margin line at the right or the left of the page, and drag the line to adjust the margins. Then the data will expand or contract to fill the new space.

Transfer App Date	AppSourceCode	Name	Date Of Birth	Voter Reg Num
2/26/2008	EDR	ANDERSON, KELLI ANN	1/1/1900	0701869720
11/19/2008	EDR	ARCHER, MARY LYNN	1/1/1900	0702042010
12/4/2008	EDR	BECKER, KATHERINE R	1/1/1900	0705860750
12/2/2008	EDR	BECWAR, ENRIQUE A	1/1/1900	0704796920

- e. If you want to add a title or other information to the **Header** and **Footer**, click the **Header/Footer**

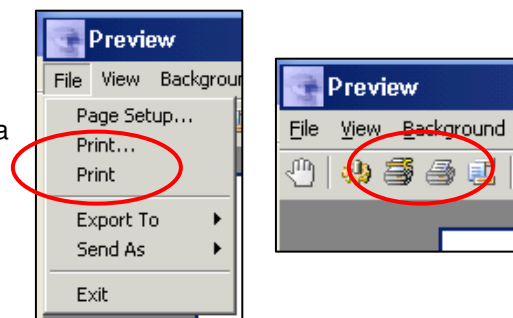
button  in the top menu bar. You may position the mouse in the right, center, or left of the **Header** or **Footer** and add text. You may use the buttons at the bottom of the **Header/Footer** screen to add page numbers, your user name, or the date or time the document was printed.



Note: There are other options you can change using the Report Designer. Have fun experimenting!

6. Print or Export your report:

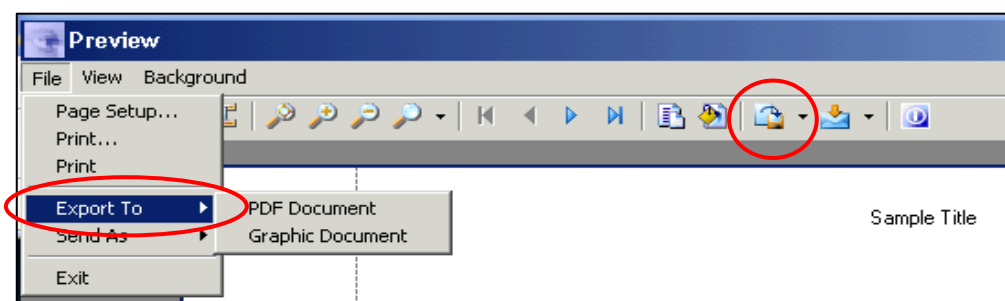
- f. From the **File** menu, select **Print...** or use the **Print...** button (this allows you to choose a Printer). You may also select **Print** or the **Print** button (this immediately prints to the default printer).



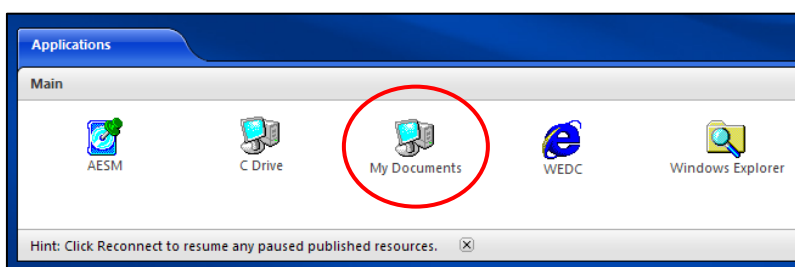
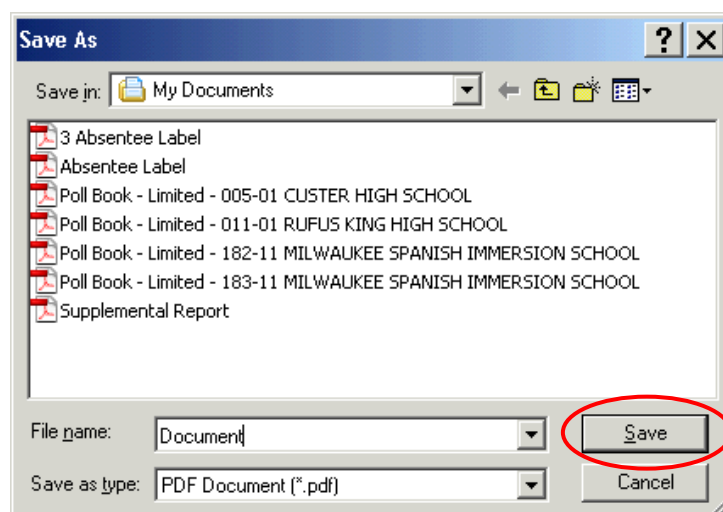
- g. If you would like an electronic copy of this report, you may use the **Export** button  in the top menu bar, or go to the **File** menu and select **Export**.



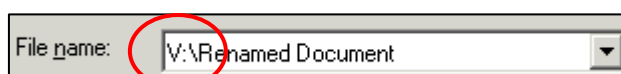
*Note that the only exports available are to PDF or graphics files – you cannot produce an Excel spreadsheet or Word document. Basically you will end up with an electronic picture of the report that you cannot change. If you want your data in another format, (usually an Excel spreadsheet), you should follow the directions starting with **Step 7** below to copy and paste the data.*



- h. The **Save As** dialog box will appear. In the **File Name**, you may rename the document. When you click the **Save** button, the file will be sent to the **My Documents** folder in the Citrix Login page.



You may also type **V:** in front of your document name and export the file directly to your C: drive without going through the Citrix screen.



See the section below on [Exporting a Report](#) for further directions on retrieving your document.

7. To copy search results from the data grid into a Microsoft Excel spreadsheet (*i.e., instead of printing search results directly from SVRS as shown above*):

- Select **Ctrl A** to highlight the data information from the data grid,
- Select **Ctrl C** to copy the information from the data grid,
- Open a spreadsheet in Microsoft Excel;
- Then select **Ctrl V** to paste the data information into the excel spreadsheet.

The screenshot shows the SVRS application window. On the left is a 'Menu' sidebar with options like 'Welcome to AESM', 'Voter', 'Voter Transfers' (highlighted), 'Voter Applications', 'Absentee Applications', 'Elections', 'Election Workers', 'Polling Place Locations', 'Contacts', 'Payment', 'Addressing and Districts', 'Calendar', 'Reports', 'Labels and Mailings', 'Scheduler', and 'Administration'. The main area contains search filters: 'Transfer App Date Between' (with date pickers), 'From Jurisdiction' (set to 'CITY OF BOSCOBEL'), 'To Jurisdiction' (empty), 'Transfer Status' (dropdown), 'First Name', 'Last Name', and 'Voter Reg Num'. Below these filters, it says 'Records Returned: 81' and has 'Search' and 'Clear' buttons. A table of results is displayed with columns: 'Transfer Ap...', 'AppSo...', 'Name', 'Date Of Birth', and 'Voter Reg Num'. The table lists 13 records, including Anderson, Kelli Ann, Archer, Mary Lynn, Becker, Katherine R, Becwar, Enrique A, Berger, Sue E, Bernier, Nicole E, Bloyer, William Clayton, Brandes, Joyce L, Brown, Dirk Jerome, Brown, Stephanie Michelle, Byers, Justin Alan, Callahan, Robert W, and Corcoran, Kayla M.



Note: whenever you paste information from the data grid into a Microsoft Excel spreadsheet, the data columns, column positions, and sorts will not appear in the spreadsheet as they do in the data grid in SVRS. You will have to create new columns, column arrangements, and sorts in Excel.

	A	B	C	D	E	F	G	H
1	CLRKO	#####	7.02E+08	9/23/2008	YUNGHANS, ELEANORE E			
2	CLRKO	#####	7.02E+08	9/23/2008	YUNGHANS, CHARLES E			
3	EDR	#####	16588279	4/16/2009	WRIGHT, STEVEN OWEN			
4	EDR	#####	2637335	#####	WINGER, STEVEN L			
5	EDR	#####	7.02E+08	#####	WINGER, CARLA A			
6	LATE	#####	16588250	4/9/2007	WILLIAMS, ARTHUR R			
7	EDR	#####	16540135	#####	WETTER, GAIL MARIE			
8	EDR	#####	7.02E+08	#####	WETTER, DAVID RODNEY			
9	EDR	#####	16588297	#####	WASHBURN, BRIAN E			
10	EDR	#####	7.01E+08	#####	TRANEL, KARI LEE			
11	EDR	#####	18222876	#####	TRANEL, CHRISTOPHER D			
12	EDR	#####	16588474	#####	TIMMERMAN, GREGORY DAVID			
13	REGDR	#####	7.02E+08	#####	SPEAKER, HUGO A			

Ad Hoc Reports



Ad Hoc Reports are a set of standard reports available at any time in SVRS. Ad hoc reports can be filtered, sorted, and then printed or exported to a file. The report layout can also be modified and saved for future use.



Special reports have been created for Wisconsin to comply with G.A.B. reporting needs and to help clerks more easily use SVRS. These reports all have the prefix of "WI" to help identify them. Please refer to [The Reports Reference Guide](#) at the end of this chapter for a list of commonly used Ad Hoc Reports.

Understanding Filters and Sorts

1. A **Filter** controls what data appears, or doesn't appear, in the report.
2. A **Sort** controls the order that the data appears in.
3. To build a filter in SVRS you need four components:
 - a. The **And/Or** logic criteria
 - b. The filter **Field Name**
 - c. The filter **Condition**
 - d. The filter **Value**
- When building a filter always start the filter with the **And** logic criterion. Note, when you use the **And**, every single criterion within the filter must be met to for the data to appear on the report. When you use the **Or** logic criterion only one of the filter criteria must be met.

For example, the filter below will pull only active voters who also have a 1/1/1900 date of birth.

AND/OR	FIELD NAME	CONDITION	VALUE
And	Voter Status	Equals	ACTIV*
And	DOB	Equals	1/1/1900

While the following filter will pull all voters who are **Inactive** or **Cancelled**.

AND/OR	FIELD NAME	CONDITION	VALUE
And	Voter Status	Equals	INACT*
Or	Voter Status	Equals	CANC*



*Note: When combining multiple filters as seen in the examples above, you can also use the **And()** and **Or()**, which will treat the filter criteria inside the parentheses as one line. For example, **And(Ward Equals WD1; Or Ward Equals WD2)** will give return a list of voters who live in Ward 1 or Ward 2.*

4. To build a sort in SVRS, choose the field name and then chose the order you want the data to sort. For example, the sort below will arrange the data by last name in ascending (alphabetical) order.

FIELD NAME	ORDER
LastName	ASC

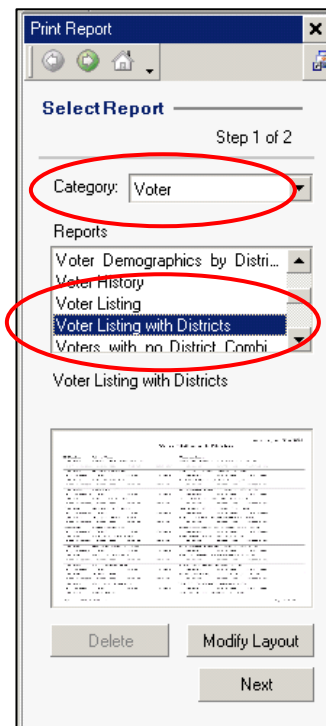
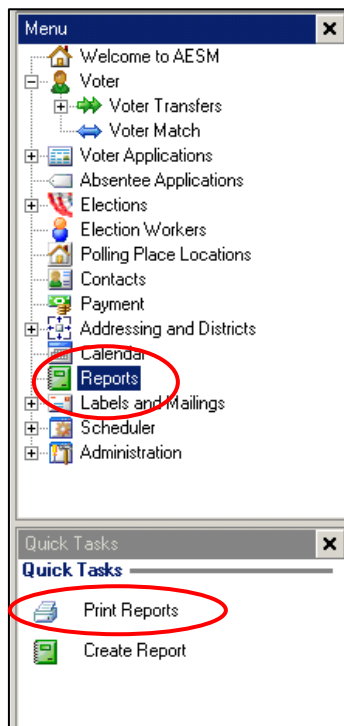
The Voter Listing With Districts Report

Printing Ad Hoc Reports

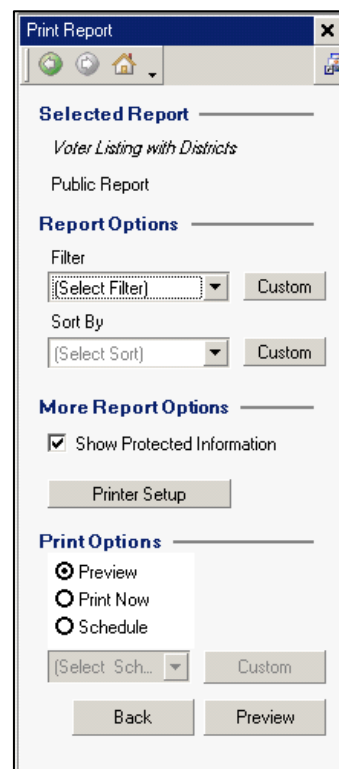
1. Click on the **Reports** node from the menu tree.
2. Then click on the **Print Reports** Quick Task.
3. Choose the report **Category**. In this example, we have left the default **Category**, **Voter**, selected.

The Ad Hoc Report Categories available are:

- *Absentee*
- *Applications (Voter Apps)*
- *Contacts*
- *Elections*
- *My Saved Reports*
- *Poll Worker*
- *Polling Place*
- *Saved Reports*
- *System Reports*
- *Voter*



4. Select a **Report** from the list. To see the full title of the report, expand the menu pane or click on the name in the list box. The full title appears below the box. In this example, we have selected **Voter Listing With Districts**.
5. Click **Next**. At this point, **Report Options**, **More Report Options** and **Print Options** are available. The options available in these areas are explained over the next several pages.
6. **Report Options** include **Filters** and **Sorts**. For more information, see the sections on [Custom Filters](#) and [Custom Sorts](#) below.
7. **More Report Options** include the **Printer Setup** button which allows you to choose a specific printer or enter a name for a file to export it to Excel or PDF. **More Report Options** also include a checkbox for displaying protected information. *Please note that unchecking this checkbox will not automatically remove confidential information like the voter's date of birth or driver's license number. If information like this is included in your report, you cannot share it with the public. You will have to delete that column from your file, or manually redact it from your paper copy.*
8. **Print Options** include **Preview**, **Print Now** or **Schedule**.



More information on the **Printer Setup** and **Print Options** can be found in the [Print Options](#) section below.

Creating Custom Filters for Ad Hoc Reports

A Custom Filter allows you to select the particular records you want to include on or exclude from your report. Most reports will require a filter to make the report useful.

- To create a custom filter open the custom **FilterForm** by clicking the **Custom** button next to the filter drop-down box. Note: if you have previously created a filter and saved it, it can be selected from the drop-down menu.

- For each line of a filter, enter a value in all four columns.
 - All lines start with **And/Or**, with the first line always starting with “**And**”. You may also use the **And**(or **Or**(functions if you use the same **Field Name** multiple times, for example if you want voters from Ward 1 or Ward 2 or Ward 3. For an example of how to use the **And**(see the Voter Listing Report in the Voter chapter.

- The second column is the **Field Name**.

These are the names within the system for a data field. The Field Name must come from the dropdown list; it can not be free typed. **Field Names** can vary from report to report, so often you will have to scan through the list to determine which **Field Name** you want to use.



*Note: Many field names are similar. In the example above, **DistrictCombo Code** is the nine digit number (e.g. 13008-001-1) that represents the district combo. A field called **District Combo Name** or **District Combo Description** would be something like Town of Blooming Grove – Ward 1 – Split 1. Any field that ends with **ID**, like **DistrictID**, would be an SVRS generated number and is unlikely to be of use in any report.*

- The third column is the **Condition**. You will use **Equals** for items like the **Voter Status** or **District Combo Code**. You will use **IsGreaterThan** or **IsLessThan** for date fields, like **Date Registered** or **Application Date**.



The filter displayed above will produce a list of active voters in the City of La Crosse who registered after 1/1/2010. You may filter by other fields if desired. The Voter Listing section in the Voter chapter has more information on filtering and sorting – because the two reports share many of the same fields, the same filters may work in both.

- d. The fourth column is the **Value**. Enter the specific data value that you are filtering on. Note how asterisks * are used as wildcard characters. In the example below, if the **DistrictCombo Code Equals 32246***, the asterisk means “and anything that comes after it.” So this filter will select all voters with a **DistrictCombo Code** that starts with **32246**, or all voters in the City of La Crosse. The asterisk is also included after codes like **ACTIV*** in the **Voter Status** line. Some reports use “ACTIV” and other reports use “ACTIVE” as the value for **Voter Status** (or **Status Code**). Placing the asterisk after the **ACTIV*** will work in reports that require “ACTIV” and in reports that require “ACTIVE”.

The FilterForm window has a menu bar with 'Use Filter', 'Save', 'Save As', 'Delete', 'Clear', and 'Close'. Below is a 'Filter Name' dropdown. The main area shows a table for 'RPTView_AESM_VoterListDistrict'.

And/Or	Field Name	Condition	Value
And	DistrictCombo Code	Equals	32246*
And	Voter Status	Equals	ACTIV*
And	Date Of Birth	Equals	1/1/1900

At the bottom right, there are blue and red X buttons.



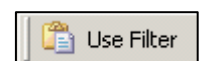
When you are trying to figure out the correct filter value to use: 1) Click in the **Value** field and see if you can select the desired criteria from the drop-down list. 2) If no drop-down list is provided, try to enter part of the code or description with asterisks before or after. 3) If you need to filter by a **District**, you may try the **District Type**, **District Code**, or **District Description** available in the **Districts** node. You can also use the **Runtime Column Customization** box to add the **DistrictID** column to the **District Details** grid, and try to filter by the **DistrictID** number. 4) If you still are not seeing the records you expect to see, call or email the GAB Help Desk for assistance.

The left pane shows a 'Menu' with 'Districts' expanded, listing various district types like 'District Combos', 'Ward', 'Congressional District', etc. The main grid shows columns: District Type, District Code, Description, DistrictID, Normal Polling, and Owner. A 'Customization' box is open on the right, showing a list of fields to add to the grid.

3. After entering a row of criteria for the filter, click on the next blank line. Multiple lines can be entered. Use the blue arrow button to add a line in the filter *above* the selected line and the red X to delete the selected line. To add a line below the current line, click on the next line.

The FilterForm window shows the 'Filter Name' dropdown with 'Active Voters w Default DOB'. A 'Create New Filter' dialog box is open, asking for a unique filter name. The 'Save' button in the FilterForm menu bar is circled. The 'OK' button in the dialog box is circled. The 'Value' column in the filter table is also visible.

4. To save the custom filter, enter a **Filter Name**, then click on **Save**. When the confirmation box opens, click **OK**. Then click **Use Filter**. If you do not wish to save, you may just click **Use Filter**.



- Saved Custom Filters can be reused. Just select the saved filter from the **Filter** drop-down box when running this report again.



If you no longer wish to use a saved filter, you may select the filter from the **Filter** drop-down box, click the **Custom** button to open the filter, and click the **Delete** button to delete it. You may only delete a filter if you were the user who created it. Changing saved filters is not recommended. Instead, you should delete the filter and create a new one.

Creating Custom Sorts for Ad Hoc Reports

To put the records in the order you desire, you will create a **Custom Sort**.

- Open the custom sort form by clicking the **Custom** button next to a **Sort By** drop-down box. If you have previously created and saved a sort for this report, you can select it from the drop-down list.

- The Sort form allows you to select a **Field Name** and indicate ascending (**ASC**) or descending (**DESC**) **Order** for each field. Multiple lines of sort can be entered. Use the blue arrow to add a line in the sort above the current line and the red X to delete the selected line.

FieldName	Order
JurisdictionID	ASC
DistrictCombo Code	ASC
Last Name	ASC
First Name	ASC



The Sort displayed could be used for a Voter Listing with Districts report run for La Crosse County. It would sort all of La Crosse County by municipality, then by ward, then by the voter's last name and first name.

- To **Save** the sort, enter a name for the sort, and click **Save**. Click **Yes** at the confirmation box. Then click **Use Sort**. You can also click **Use Sort** without saving.



If you no longer wish to use a saved sort, you may select the sort from the **Sort** drop-down box, and click the **Custom** button to open the sort. You may need to click in the **Sort Name** field, then in the field underneath the **FieldName** or **Order** column to make the **Delete** button active. Then you may click **Delete** to delete the sort. You may delete a sort whether or not you were the user who created it. Changing saved sorts is not recommended. Instead, you should delete the sort and create a new one.

If you select a saved filter or sort, the name of the sort will be visible in the drop-down box. If you create a custom filter or sort and select **Use Sort** without saving, **(Custom Filter)** or **(Custom Sort)** will appear in the drop-down box.

Print Options for Ad Hoc Reports



The Report Options let you decide how you will print or view your report. You can use the Printer Setup button to control which printer you print your report to, or you can export it to a file instead. You may Preview your report, Print Now, or Schedule it to print later.

Printer Setup

Before printing or exporting a report, click on **Printer Setup**.



The settings that are saved for a report will remain until **Printer Setup** is changed and saved again. It is a good practice to check the **Setup** each time you run a report.

Print Directly to a Printer

1. Click on **Printer Setup** to open the **Print** dialog box.
2. If **Default Printer** is selected, the report will automatically print to the default printer.
3. If **Specific Printer** is selected, you may select your printer from the drop-down list.
4. Click on **Save Settings**.

Export to a File

This option will create a file that can be saved and printed later, or emailed.

1. Open **Printer Setup**.
2. Select **Export to File**.
3. Enter a name for the file. In the example at the right, a date has been added to the file name. You may not use slashes / \ in a file name, but dashes are allowed.



In the example to the right, the file will be exported to the **My Documents** folder on your **Citrix Metaframe** page.



In the example below, the file name is preceded by "V:\". In most cases, this will export the file directly to your **C: drive**, meaning you will not have to log into the **Citrix Metaframe** page and move the file from the **My Documents** to the **Client C: Drive** folder. In some networks, your hard drive is not called the C: drive, it is called the H: drive or another letter. In that case, you can try using "H:\\" instead, or another letter as appropriate.

Sending files directly to your **C: drive** may not work if you do not have rights to save files to your **C: drive**, the specific file you want to generate is too large, or the system is too busy. If the file is too large or the system is too busy, you will receive a message that the file will be **immediately scheduled**. **If you see this message, the export has failed**, and you should remove the V:\, and export the poll list to the **My Documents** folder instead.



If you want to save your file to a special sub-folder in the **My Documents** folder, you can click the **Browse** button to the right of the file name. First, you must create the new folder:

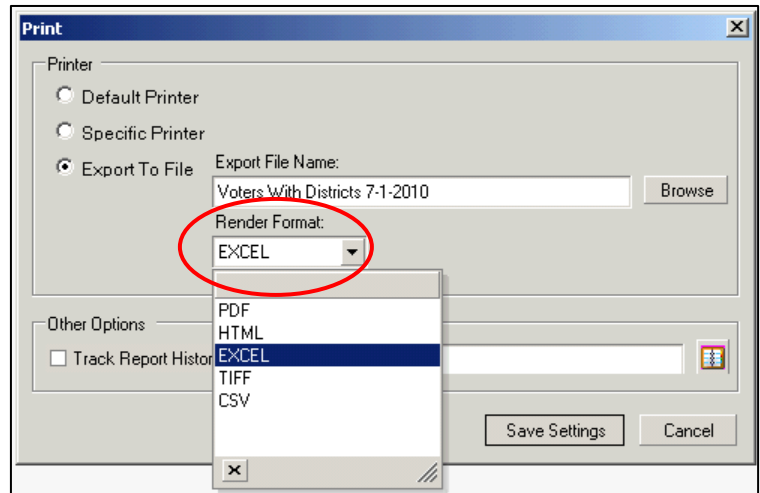
In this example, the new folder will be named **Reports**.

- Click on the **New Folder** button.
- Rename the **New Folder** to **Reports**.
- Click the **Open** button to open the new folder.
- Enter the name for the file.
- Click **Save**.

In the future, the new folder will be visible under the **My Documents** folder. You may use the **Browse** button to find the folder and save your documents there.

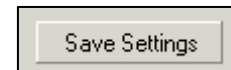
4. Choose a **Render Format**.

- a. You will use **PDF** for documents that contain barcodes, like poll lists and absentee ballot labels.
- b. You will use **Excel** for most lists. This will allow you to rearrange your data after the report is exported.
- c. The **CSV** option has three benefits. First, you can export larger files that will not fit into the Excel format (Excel 2003 is limited to 64,000 lines). Second, the **CSV** format removes the formatting, so each record takes up only one line. This is useful if you want to fit more records on each page. Third, **CSV** is a smaller file and will export more quickly. **CSV** files can be open in Notepad, Excel, or Access.



Based on the settings above, when you click the **Print** button, the file will export to the **My Documents** folder on your **Citrix Metaframe** screen. This is the **My Documents** folder on the server in Madison, not a **My Documents** folder on the computer in your office. To transfer the file to your own computer and use it, you must follow the directions below on how to retrieve the exported file.

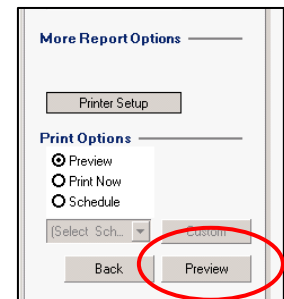
5. When you have finished setting up your file for export, click **Save Settings**.



Preview

1. With the Print Option **Preview** selected, click on the **Preview** button. There are several things to remember about the **Preview** screen

- a. The **Preview** may not have exactly the same formatting as a printed or exported report. If data or titles seem to be in the wrong place, go ahead and print or export, and the printed document or file should be properly formatted.
- b. A **Preview** is limited to 50 voter records, so you will not be able to preview your entire report. Other reports, for example the Address Range by Address Range Type report, will be limited to even fewer records, because multiple voters live on every street. Once you print or export your file, all records will appear.
- c. There is a **Printer** button and **Export** button available from the top menu bar of the **Preview**. You should not use these options. Instead, you should use the **Printer Setup** dialog box to create your print or export settings.
- d. You should usually preview your file to make sure records appear, and that they are in the correct order. If no records appear, something may be wrong with your filter or sort. Check them and make sure records appear in the **Preview** screen before you print or export your file.



A sample of the **Preview** screen is shown below. Notice that the filter you created is displayed between the title and the report data, so you can tell which records should appear in the report.

Warning! Previews are limited to a maximum number of 50 records. However, due to groupings on selected records, reports may show less than the maximum number of records for

LA CROSSE COUNTY

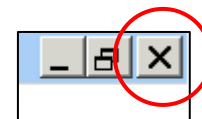
00000-VOT-413-C
6/25/2010 8:56:14 AM

Voter Listing with Districts

(1 = 1 AND (RPTView_AESM_VoterListDistrict [Voter Status] LIKE 'ACTIV%') AND (RPTView_AESM_VoterListDistrict [DistrictCombo Code] LIKE 'S2240%') AND (RPTView_AESM_VoterListDistrict [Date Of Birth] = '1/1/1900'))

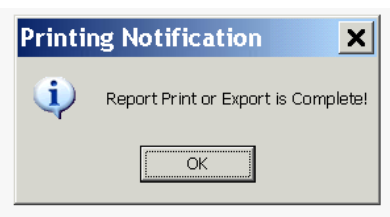
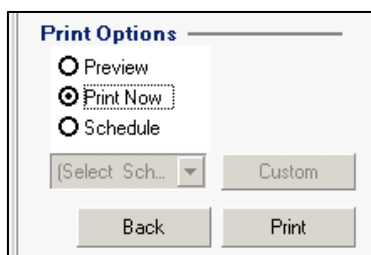
Voter Reg	Voter Name	Voter Address	WARD	CONG	SEN	ASSM	COA	MJJ	CO	COSUP	MUNI	ALD	CSCH	HSCH
0030079108	MYERS, ELAINE M	2115 CHARLES ST LA CROSSE, WI 54603	WD1	CG03	SS32	AS95	CA4		CO32	SU1	MN246	AL1		
0030094623	WUEST, ELAINE D	2127 WOOD ST LA CROSSE, WI 54603	WD1	CG03	SS32	AS95	CA4		CO32	SU1	MN246	AL1		
0030094622	WUEST, THOMAS P	2127 WOOD ST LA CROSSE, WI 54603	WD1	CG03	SS32	AS95	CA4		CO32	SU1	MN246	AL1		
0030042178	ANGELL, MARY ANN	1703 LIBERTY ST LA CROSSE, WI 54603	WD2	CG03	SS32	AS95	CA4		CO32	SU2	MN246	AL2		
0030047130	BLASCHKE, JEROME A	400 GILLETTE ST LA CROSSE, WI 54603	WD2	CG03	SS32	AS95	CA4		CO32	SU2	MN246	AL2		

- You must close the **Preview** using the **X** in the upper right hand corner before you can print the file.

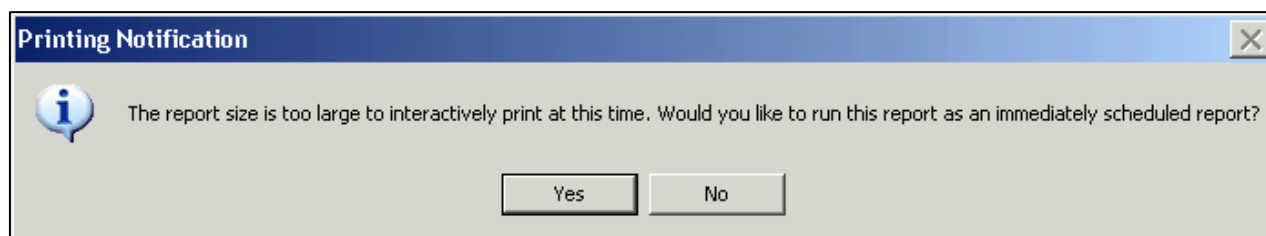


Print Now

- Verify that your print or export settings are correct.
- Select **Print Now**.
- Click on **Print**. Unless the system is too busy or your report is large, the report should go directly to the selected printer or the exported file.
- A dialog box will appear telling you the **Report Print or Export is Complete!** Click **OK**.



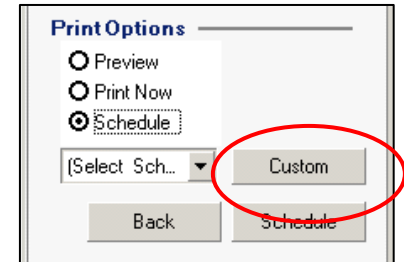
Note: If you see the error message below, the system is busy or the file is too large to print or export immediately. If you tried exporting your file directly to your computer's C: drive using V:\, you should click **No**. Go back to your **Printer Setup**, remove the V:\ and export the file to the **My Documents** folder on the **Citrix Metaframe** screen. If you exported the file without the V:\, or you set it up to print directly, you can just click **Yes**. The report will appear in the **My Documents** folder after a few minutes. Please note that if a report has over 65,000 lines (the limit in Excel 2003) and you try to export it in **Excel** format, it will never appear. Export it in CSV format instead, or divide it into a few smaller reports.



Scheduling Ad hoc Reports

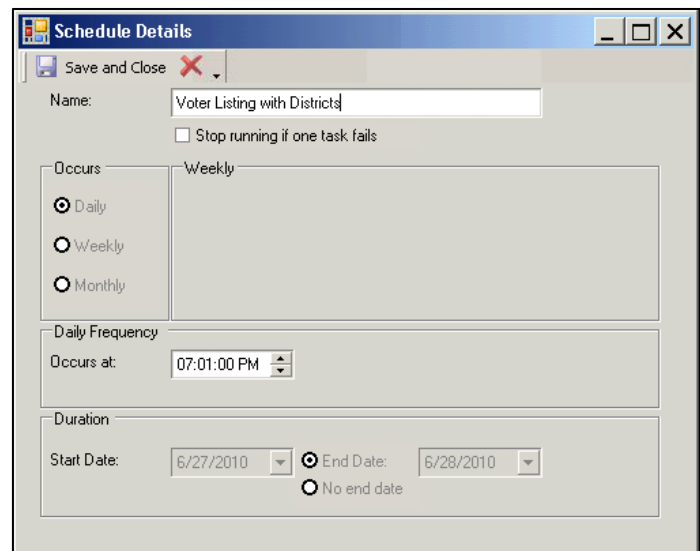
You may choose to schedule your report to run later, at a specific time. Because SVRS runs more slowly during peak business hours, you may want to have your report print later instead.

1. The scheduler will use the **Printer Setup** options, to print directly or export. Check the **Printer Setup** before proceeding
2. To send a report to the scheduler directly, in the **Print Options** panel, select **Schedule**.
3. Click on **Custom** button to open the **Schedule Details** form.



The **Print Options** dialog box contains three radio buttons: **Preview**, **Print Now**, and **Schedule**. The **Schedule** option is selected. Below these buttons is a dropdown menu labeled **[Select Sch...]** and a **Custom** button, which is circled in red. At the bottom are **Back** and **Schedule** buttons.

- a. The **Name** of the report will populate, but you can edit the name if you wish.
- b. Set the time under **Daily Frequency**. Please note: The scheduler works better if you do not set the time to run on the hour. Try 5:01 or 8:10 instead. The Scheduler will run your report just once, at the specified time.



The **Schedule Details** dialog box has a title bar with a **Save and Close** button. The **Name** field is populated with "Voter Listing with Districts". There is a checkbox for **Stop running if one task fails**. The **Occurs** section shows **Weekly** selected. The **Daily Frequency** section has an **Occurs at** field set to "07:01:00 PM". The **Duration** section shows **Start Date** as "6/27/2010" and **End Date** as "6/28/2010", with **No end date** also selected.

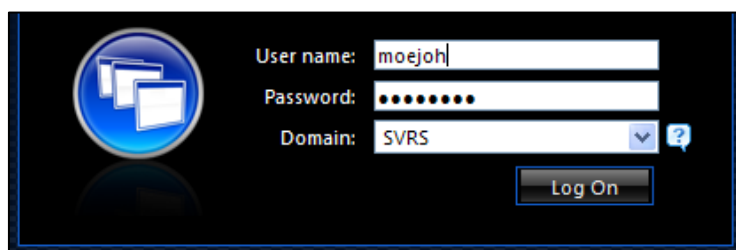
4. Click on **Save and Close**.
5. Click **Schedule** to complete.

Retrieving Reports Exported to a File

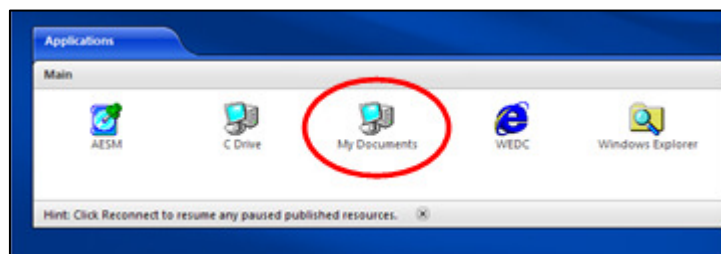


If you have used **V:** in front of the file name and successfully exported your report, skip to **Step 10**. Otherwise, follow the steps below.

1. **Log in** to SVRS. Even if you have been actively working in SVRS, you may still have gotten logged out of the **Citrix Metaframe** page.



2. The **Citrix Web Interface** screen displays. This screen contains several icons including the **AESM** icon, **Client C Drive**, and **My Documents**.



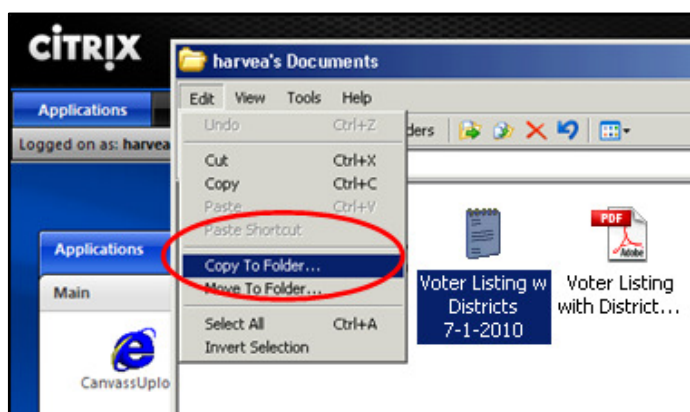
3. Click the **My Documents** icon to open the folder.



4. You will see **Z:\My Documents**. Highlight the exported report by single clicking on the file(s).

5. Click on **Edit** and select the **Copy to Folder** or **Move to Folder** command.

- Select **Copy to Folder** to copy the file to your workstation or a network directory. The original file remains on **My Documents**.
- Select **Move to Folder** to move the file. This removes it from **My Documents**.



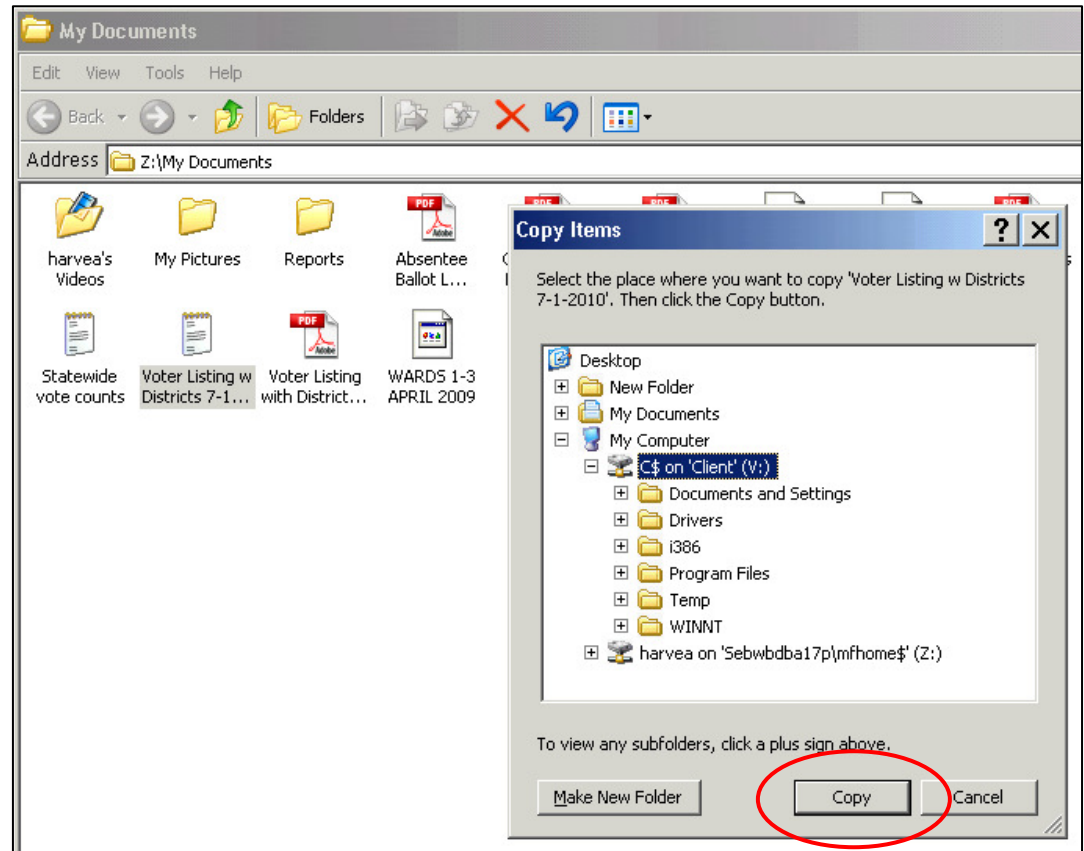
You can move or copy multiple files at the same time. Highlight specific multiple files by holding the **Control** key while clicking on the files to be moved or copied. You can also move sequential files by clicking on the first file, holding the **Shift** key, and clicking the last file to be moved or copied.

6. A dialogue box will open. Expand, or hit the plus sign (+) by the **C\$ on Client (V:)**. This will display the folders on your computer.

7. Choose the location within the C drive to move or copy the files. You may choose to leave the **C\$ on Client (V :)** selected and moves the file to your C: drive, or select a subfolder. Hit the plus sign (+) by a folder to see available subfolders.

8. Click the **Move** or **Copy** button.

9. The file is moved or copied to the local hard drive.




10. From your hard drive, use your file menus, or **Windows Explorer**, to access your report. You may print the file, open and edit it, email it, etc.




*You may have difficulty transferring files from the **My Documents** folder if your office uses network directories only (so you do not have permission to access your local C: drive). Contact the GAB Help Desk to determine if the problem can be addressed through SVRS, or if your local IT staff has to help you.*

Modifying Reports


-  You may modify most reports in SVRS in order to change what information the report displays. You can access the Modify Report functionality through the Print Reports quick task.

Modifying The Voter Listing Report

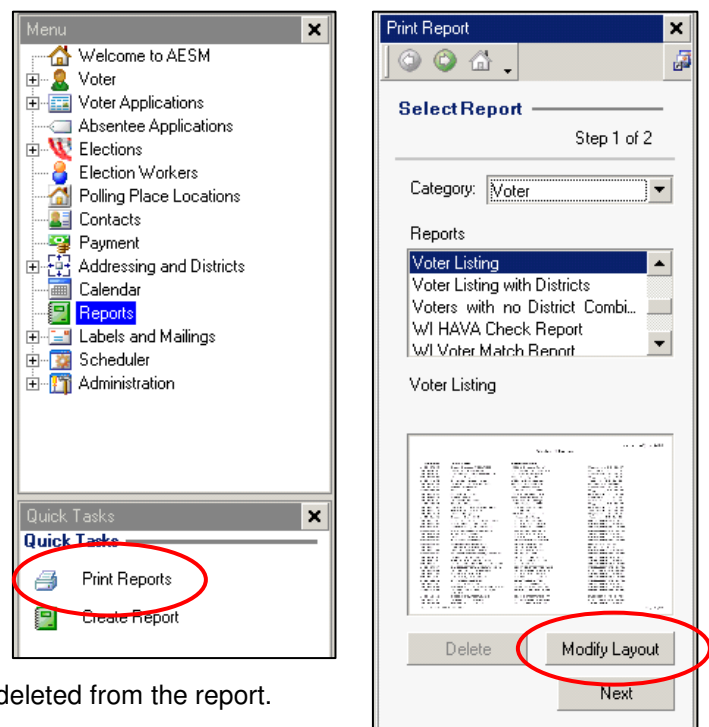
 Following the examples below will produce a Voter Listing report with two added fields, **IDRequired**, and **Voter Status**. That way you can check on your voters who will have to provide Proof of Residence at the polls, and fix errors, or send them a notice with their absentee ballot.

Modifying Layout

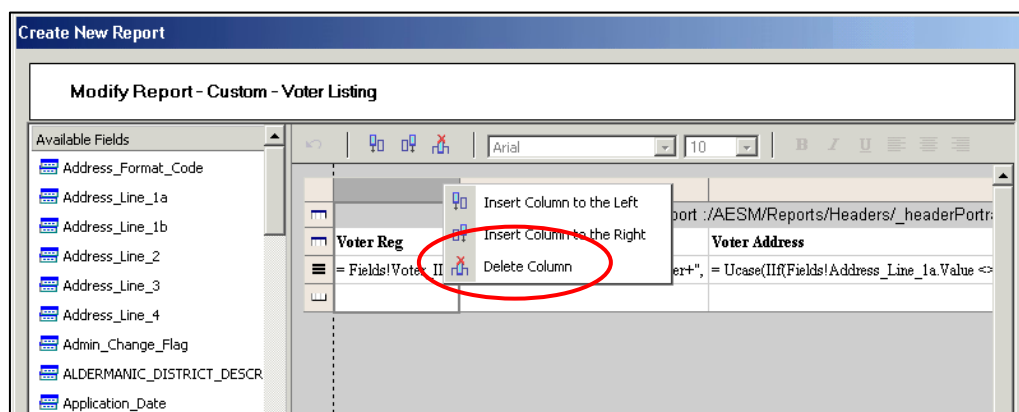
1. To modify a report's layout, first select **Reports** node, then the **Print Reports** Quick Task.
2. Select the **Category** and the **Report**. In this example, the **Category** is **Voter**, and the report selected is **Voter Listing**.

 In some reports, the **Modify Layout** option is not available and will be grayed out.

3. Click the **Modify Layout** button.
4. The **Create New Report** form appears, with the selected report's layout displayed.
5. At this point, fields can be added to the report, or deleted from the report.

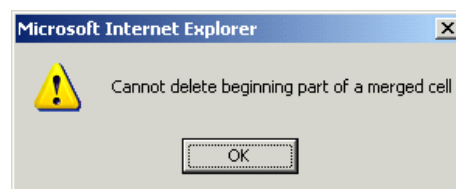


- a. Right-click at the top of the column above the data field. A menu will appear with the options to **Insert Column to Left**, **Insert Column to Right** or **Delete Column**. Alternatively, when a column is selected, the options appear as icons above the report. In this example, we will be deleting the **Voter Reg** column, because we do not want the **Voter Reg Num** to appear in the final report. Right-click on light gray space above the column header and select **Delete Column**.

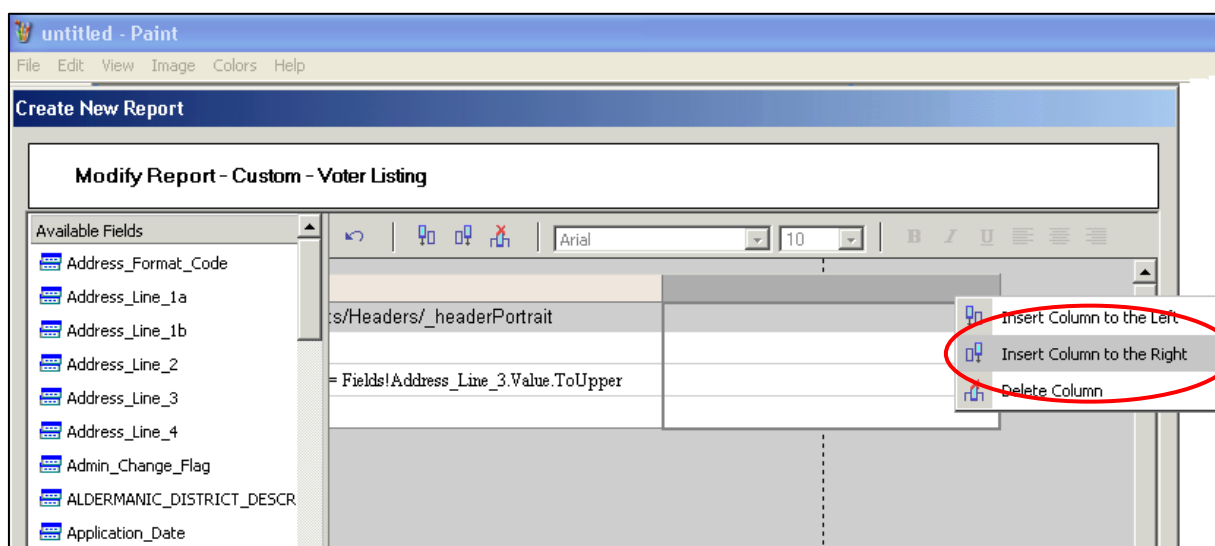




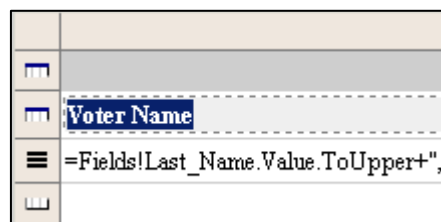
Note: sometimes a message will appear saying that the field cannot be deleted, because it is merged with another field. The values in the column can be deleted. (See c. below)



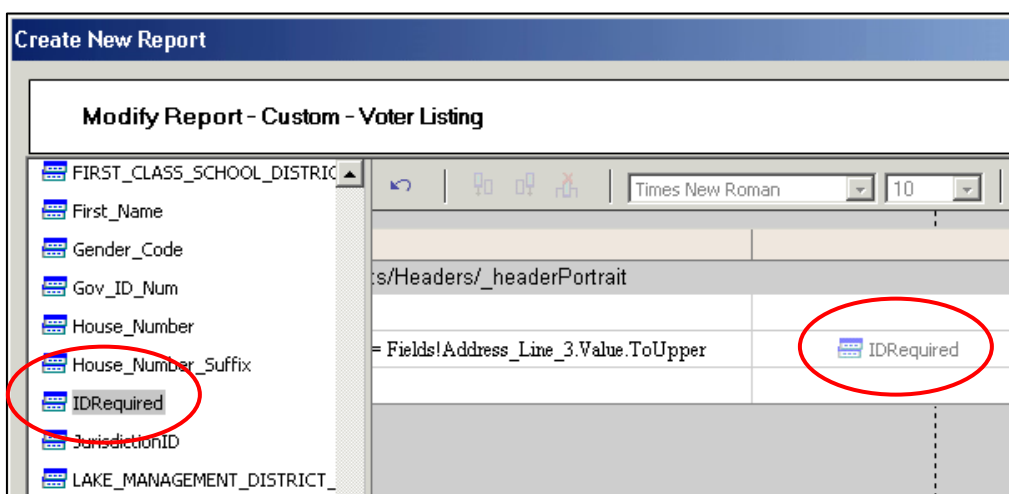
- b. To add a column, first decide where you would like the new column to appear. Right click at the top of the column to the left or right of where the new column will be placed on the report. Select **Insert Column to Left** or **Insert Column to the Right**. In this example, add a column to the right of the last column. Right-click on the second **Voter Address** column header and choose **Insert Column to the Right**. Repeat this until 2 new columns have been added at the end of the report.



- c. To delete a field, but keep the column to use for another data field, click in the cell that contains the title, highlight the title and hit the **Delete** key. Do the same for the field description in the cell below. In the example to the right, the title has been selected and can now be deleted. This will leave an empty cell which can be used for a new data field. We will skip this option in the current example.



- d. Move a new data field into the report. Click on the column name in the **Available Fields** panel on the left. Drag and drop the field into the second cell, or the cell below the title, in an empty column. In this example, we will drag and drop the **IDRequired** field. That data will be inserted into the report at this location.



Drag and drop the column **Status Code** into the middle row of the last column.

The screenshot shows the 'Create New Report' window with the 'Modify Report - Custom - Voter Listing' tab selected. On the left, a list of fields includes STATEWIDE_DESCRIPTION, Status_Code, Status_Reason_Code, Street_Name, Street_PostDirectional_Code, Street_PreDirectional_Code, Street_Type_Code, and TECHNICAL_COLLEGE_DISTRICT. The main area displays a table with two columns: 'ID Required' and 'Voter Status'. The 'Voter Status' column is highlighted with a red circle. Above the table, a formatting toolbar is also highlighted with a red circle, showing options for font (Times New Roman), size (10), bold (B), italic (I), underline (U), and alignment (left, center, right).

- e. Edit the **Title**. This appears above the data field. The text will be bold. In this example, we will add a title for **ID Required** and a title for **Voter Status** in our two new fields.



To format the font in a title or data field line, click in the section and select the font name, font size, **B** for Bold, **I** for Italics, and **U** for Underline. You may also use the **Justification Icons** to make the selected text left-justified, right-justified, or centered.

- f. Before you continue, you **must ensure that all columns fit entirely within the black-dotted vertical line** at the right of the page. This is the page margin, and if columns extend beyond it, your report will not be formatted correctly. To fix this, hover your mouse above the line that divides two columns, or at the right edge of the final column. When the mouse becomes a double arrow icon, click down and drag to the left to make the column shorter. Repeat for each column until all columns fit within the margin line.

The screenshot shows the 'Create New Report' window with the 'Modify Report - Custom - Voter Listing' tab selected. On the left, a list of fields includes STATEWIDE_DESCRIPTION, Status_Code, Status_Reason_Code, Street_Name, Street_PostDirectional_Code, Street_PreDirectional_Code, Street_Type_Code, and TECHNICAL_COLLEGE_DISTRICT. The main area displays a table with two columns: 'ID Required' and 'Voter Status'. The 'Voter Status' column is highlighted with a red circle. Above the table, a formatting toolbar is also highlighted with a red circle, showing options for font (Arial), size (10), bold (B), italic (I), underline (U), and alignment (left, center, right). A red circle highlights the right edge of the table, indicating the page margin.

6. When you have finished deleting data, adding data, and adjusting the column sizes, click **Next>>** to continue.

Next >>

7. Name the report. When the report is saved, this name will appear under the **Saved Reports** or **My Saved Reports** category.



Keep the report name under 60 characters and do not use symbols like & or #. To make the name unique throughout the state you may need to add your Hindi number or initials to the report name. If you get an error when saving the report, you should check the report name first to make sure you followed all of these rules.

8. You will not use the **Default Report Filter** or **Default Sort By** fields. Instead, you will save the report and add the desired filters and sorts before you print it.
9. Click **Next>>** to continue.

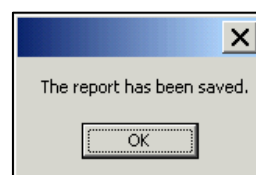
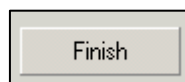
10. Use the **Preview Report** button so to verify that the correct data appears before you save.

11. Check the **Save report for future use** checkbox and choose **Save for Everyone's Use**. This will make your modified report available to everyone in your municipality. You will find it under the **Category** of **Saved Reports**.



SVRS users at the state and county levels will want to use the **Save for Me Only** option. This will allow you to use the report in all of the different jurisdictions you have access to. You will find your report under the **Category** of **My Saved Reports**.

12. Click **Finish** to complete. When you see a dialog box confirming that **The report has been saved**, the modified report is now available to run.



If you get an error message when trying to save your file, first try and change the file name. If you are still having trouble saving the file, contact the GAB Help Desk for assistance.

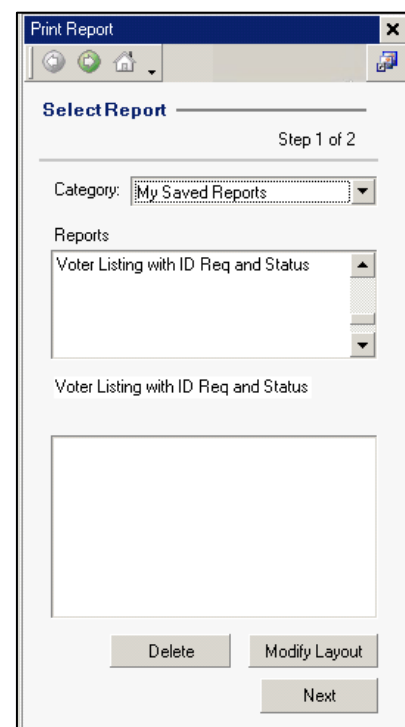
13. To print or export the modified report, return to the Main Menu. From the **Reports** node, select the quick task **Print Reports**. Then select the report **Category of My Saved Reports** or **Saved Reports**.

14. Select your modified report from the list.

15. You may now use any of the options available in the reports node. You may click the **Modify Layout** button to further change the layout, or create a custom filter or custom sort. You can print this report directly or export it to a file.




*If you no longer wish to use the report, you may highlight it and select the **Delete** button.*



A sample of the report is displayed below. This report was run in the City of Rhinelander and filtered for **ID Required** equals **Yes**. A clerk might use this list to double check voters with **ID Required**, and update them if they had already provided Proof of Residence. The voters with **Inactive** or **Cancelled** statuses can be ignored.

Microsoft Excel - Rhinelander ID REQ					
File Edit View Insert Format Tools Data Window Help					
B28 639 ALBAN ST					
	A	B	C	D	E
1	Voter Name	Voter Address	ID Required	Voter Status	
2	BAKER, CALAH MAE	216 E FREDERICK ST	RHINELANDER, WI 54501	YES	ACTIV
3	BELLILE, MARGARET M	1207 MASON ST APT 318	RHINELANDER, WI 54501	YES	ACTIV
4	BOUCHER, MARGARET ROSE	227 DAHL ST	RHINELANDER, WI 54501	YES	ACTIV
5	BROKAW, MARGARET A	801 E TIMBER DR APT 7	RHINELANDER, WI 54501	YES	ACTIV
6	CARLSON, CAROLI	171 WESTHILL RD A	RHINELANDER, WI 54501	YES	ACTIV
7	CHARTIER, BENJAMIN MERRITT	325 N PELHAM ST APT 2	RHINELANDER, WI 54501	YES	ACTIV
8	CLAY, JOSEPH P	926 BRUNER ST APT 10	RHINELANDER, WI 54501	YES	ACTIV
9	DOLENSHEK, WILLIAM	421 SPRING LAKE RD	RHINELANDER, WI 54501	YES	INACT
10	FRIEDERICH, SARAH ANNE	1642 W DAVENPORT ST APT 15	RHINELANDER, WI 54501	YES	ACTIV
11	GERRITTS, RICHARD JOHN	718 W PHILLIP ST APT 210	RHINELANDER, WI 54501	YES	CANC
12	HAMMONS, WANDA J	610 JOHN ST	RHINELANDER, WI 54501	YES	ACTIV
13	HANSEN, JENNIFER D	327 HILLANDALE AVE	RHINELANDER, WI 54501	YES	ACTIV
14	HUBER, LACEY MARIE	730 W DAVENPORT ST	RHINELANDER, WI 54501	YES	ACTIV
15	JERNIGAN, DAVID ERIC	807 THAYER ST	RHINELANDER, WI 54501	YES	ACTIV
16	KLUG, LORRAINE I	718 W PHILLIP ST APT 206	RHINELANDER, WI 54501	YES	ACTIV
17	KNACK, JENNIFER PAMELA	603 N PELHAM ST	RHINELANDER, WI 54501	YES	ACTIV
18	KOST, KILEY MICHELLE	203 PLEASANT ST	RHINELANDER, WI 54501	YES	ACTIV
19	KUEHN, ELLA M	811 WOODLAND DR	RHINELANDER, WI 54501	YES	ACTIV
20	LAFOND, MARY L	1620 BALSAM ST	RHINELANDER, WI 54501	YES	ACTIV
21	LEMMENS, HELEN MARIE	718 W PHILLIP ST APT 102	RHINELANDER, WI 54501	YES	ACTIV
22	LIFSCHUTZ, JOSHUA CHARLES	123 PARK RIDGE CT	RHINELANDER, WI 54501	YES	ACTIV

Create Reports

-  The Create Reports option in SVRS is much like the Modify Reports option. Modify Report keeps the same basic formatting, so while you can eliminate extra columns of data, you cannot eliminate extra rows. Using Create Reports, you can design a report with a single record per line.

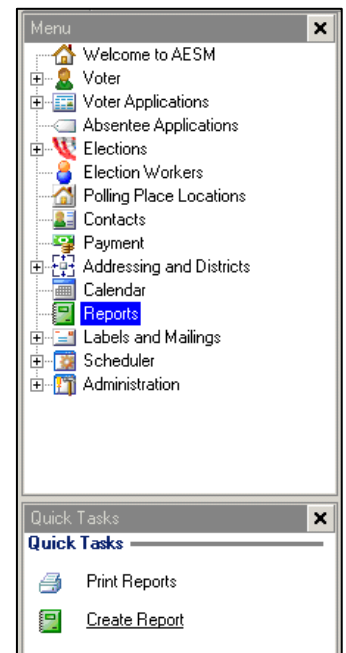
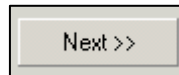
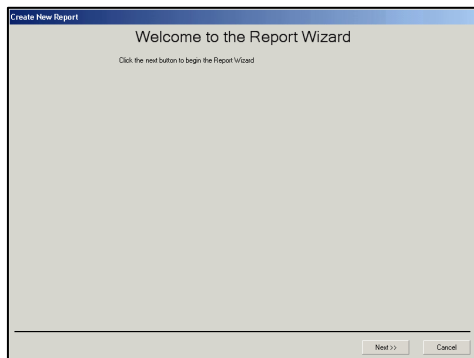
Creating a New Report Based on the WI Voter Participation Report



The WI Voter Participation Report is very useful to provide information to candidates, and track voter participation after an election. However, each voter's address takes up two lines, and most users would like a single line per voter. There are other formatting issues which may mean it is easier to create a new report than to try and modify the old one.

The Create Reports Wizard

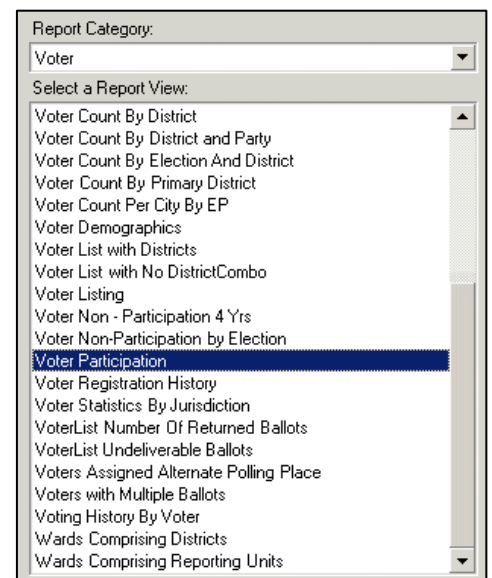
1. To create a new report based on a current report, first select the **Reports** node, then the quick task **Create Reports**.
2. The Welcome to the Report Wizard screen will appear. Click Next to proceed.



3. The next screen will display a **Report Category** dropdown list and a list of existing reports that fit under the selected category. In this example, we have selected the **Voter** category and the **Voter Participation** report.



You may notice that many of the reports listed here have slightly different names from the reports that appear in the **Print Reports** quick task. You may need to select the report and go to the next step to verify that the data fields you need are available within that particular report.



4. Click **Next**. The **Report Data Fields** screen will appear.

- Select the desired **Orientation** by clicking the radio buttons in the center right. **Portrait** means the top of the page will be 8 and ½ inches wide, **Landscape** means the top of the page will be 11 inches wide. If you exporting your new report to a file, the orientation will not make much difference.
- Search through the data fields listed in the **Report Data Fields** and find the first piece of data you want to add to the report. Click on that field, then drag and drop it into the **Custom Layout** grid at the bottom of the screen.



*In the example above, we have added the **VoterCurrentReg Voter Reg Num, Last Name, First Name, Middle Name, Name Suffix, Election Date, Voter Home Address Line 1a, Voter Home Unit Number, Voter Home Address Line 3**, and we will also add **Voter Home Address DistrictCombo Code**. This gives us a nice set of information on the voter, voter's districts, and the election in which they participated.*

- You may resize the columns shown here by clicking on the line that forms the border between two columns and dragging it to the left or right to make the column shorter or wider.
- You may reorder the columns by clicking on the column header and dragging and dropping it into a new position. In the example below, we are moving the **Election Date** column to the beginning of the report.

5. When all of the columns are properly arranged, click **Next**.

6. In the **Report Description and Options** screen, you will enter the **Report Name**. The name must be less than 60 characters, should not include symbols, and must be unique statewide. You may need to add your Hindi number or initials to make the name unique.



*You will not use the **Default Report Filter** and **Default Sort By** fields. After you have saved your report, you can create filters and sorts before printing it.*

7. Click **Next**.

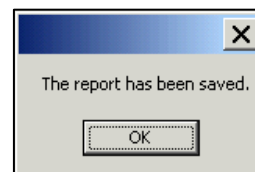
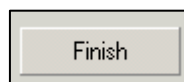
8. Use the **Preview Report** button so to verify that the correct data appears before you save.

9. Check the **Save report for future use** checkbox and choose **Save for Everyone's Use**. This will make your modified report available to everyone in your municipality. You will find it under the **Category** of **Saved Reports**.



*SVRS users at the state and county levels will want to use the **Save for Me Only** option. This will allow you to use the report in all of the different jurisdictions you have access to. You will find your report under the **Category** of **My Saved Reports**.*

10. Click **Finish** to complete. When you see a dialog box confirming that **The report has been saved**, the modified report is now available to run.



If you get an error message when trying to save your file, first try and change the file name. If you are still having trouble saving the file, contact the GAB Help Desk for assistance.

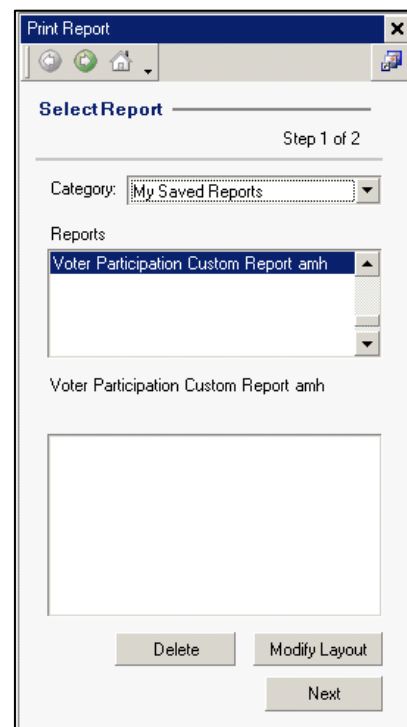
11. To print or export the modified report, return to the Main Menu. From the **Reports** node, select the quick task **Print Reports**. Then select the report **Category** of **My Saved Reports** or **Saved Reports**.

12. Select your modified report from the list.

13. You may now use any of the options available in the reports node. You may click the **Modify Layout** button to further change the layout, or create a custom filter or custom sort. You can print this report directly or export it to a file.



*If you no longer wish to use the report, you may highlight it and select the **Delete** button.*



A sample of the report is shown below. This report was run in the City of Rhinelander, filtered for **Election Date Equals 4/6/2010**, and sorted by **Last Name** and **First Name**. A candidate might request this report to get a list of all voters in her district who voted in a specific election. You may also wish to add the **County Sup District** and **Aldermanic District** columns to this report.

Microsoft Excel - Rhinelander Voter Part									
File Edit View Insert Format Tools Data Window Help									
A1 Election Date									
	A	B	C	D	E	F	G	H	I
1	Election Date	VoterCurrentRe	Last Name	First Name	Mid Name	Voter Home Address	Voter	Voter Home Address	Voter Home
2	4/6/2010 12:00:00 AM	0018165265	ADAMS	AMY		421 DOYLE ST		RHINELANDER, WI	44276-008-1
3	4/6/2010 12:00:00 AM	0701419890	ALBERTSON	BRETT	STE	520 S EASTERN AVE		RHINELANDER, WI	44276-019-1
4	4/6/2010 12:00:00 AM	0018172363	ALBRECHT-	CHERYL	J	906 LYNNE ST		RHINELANDER, WI	44276-006-1
5	4/6/2010 12:00:00 AM	0707029770	ANDERSEN	VIGGO	C	903 BOYCE DR	211B	RHINELANDER, WI	44276-015-1
6	4/6/2010 12:00:00 AM	0018169526	ANDERSON	VIOLET	FRA	1000 DAY ST	102	RHINELANDER, WI	44276-013-1
7	4/6/2010 12:00:00 AM	0018167053	ANGELL	GEORGE	R	715 S KEENAN ST		RHINELANDER, WI	44276-018-1
8	4/6/2010 12:00:00 AM	0018165017	ANNIS	DENNIS	C	1323 EAGLE ST		RHINELANDER, WI	44276-002-1
9	4/6/2010 12:00:00 AM	0018165018	ANNIS	DONNA		1323 EAGLE ST		RHINELANDER, WI	44276-002-1
10	4/6/2010 12:00:00 AM	0018170463	ASCHENBREN	ROBERT	R	338 HIGHVIEW		RHINELANDER, WI	44276-014-1

Pricing on SVRS Data Reports



In order to ensure uniform treatment of requests from candidates and the public, all users should follow the data pricing guidelines. Full information on data pricing is available at <http://gab.wi.gov/clerks/svrs>, under Voter Data Requests.

Notes on Data Requests



If you receive a request for data from a member of the public, candidate, or organization, you should charge them a \$25 flat fee plus \$5 per thousand records (rounded to the nearest thousand). This means that every report should cost at least \$30. The price for a statewide list tops out at \$12,500.



Occasionally, you may receive a request that you cannot fulfill on your own. The G.A.B. is able to run queries that local users cannot. If you are having difficulty fulfilling a request, you may choose to refer that person to the GAB Help Desk instead.



The document at the right is the GAB-361, used to track data requests. You may wish to use something similar to track data requests in your office.

<p><small>Post Office Box 7984 212 East Washington Avenue, 3rd Floor Madison, WI 53707-7984</small></p>	<p>Government Accountability Board Voter Data Request Form</p>	<p><small>Voice (608) 261-2028 Fax (608) 267-0500 E-mail: gab@wi.gov http://gab.wi.gov</small></p>
<p>I hereby request: <input type="checkbox"/> Voter Data <input type="checkbox"/> An Estimate Date: _____</p>		
<p><u>For the Jurisdiction or District checked below</u></p>		
<p><input type="checkbox"/> State of Wisconsin</p> <p><input type="checkbox"/> U.S. Congressional District number _____</p> <p><input type="checkbox"/> State Senatorial District number _____</p> <p><input type="checkbox"/> State Assembly District number _____</p> <p><input type="checkbox"/> County of _____</p> <p><input type="checkbox"/> City/Town/Village (circle one) of _____ (also designate the county, above)</p> <p><input type="checkbox"/> School District: _____ (common union unified) (also designate the county/counties above)</p> <p><input type="checkbox"/> County Supervisory District number _____ (also designate the county, above)</p> <p><input type="checkbox"/> Aldermanic/Village Supervisory Dist. # _____ (also designate the city/village, above)</p> <p><input type="checkbox"/> Other _____</p>		<p>Office Use Only</p> <p>Track ID: _____</p> <p>Estimate: _____</p> <p>Voter Ct: _____</p>
<p><u>Scope of Request</u></p>		
<p><input type="checkbox"/> All registered voters in the jurisdiction/district.</p> <p><input type="checkbox"/> Only voters from a specific election (since September 2006) _____</p> <p><input type="checkbox"/> Absentees (Specify election on line above or <input type="checkbox"/> Permanent)</p> <p><small>[Note: Some municipalities do NOT use SVRS to manage absentees]</small></p>		
<p><u>Requestor's Contact Information</u></p>		
<p>Name: _____</p> <p>Address: _____</p> <p>City/State/Zip: _____</p> <p>Phone (with Area Code): _____</p> <p>Email: _____</p>		
<p><input type="checkbox"/> Check here to also receive files by email (if possible). You will receive your data on a CD-Rom.</p> <p><input type="checkbox"/> Check here to receive a paper file by mail instead of electronic file.</p>		
<p>To receive a cost estimate, contact the G.A.B. Help Desk 608-261-2028, by fax at 608-267-0500 or by e-mail at gabhhelpdesk@wi.gov. Requests are processed only when payment has been received. Payment may be by cash or check; make checks payable to "Wisconsin Government Accountability Board" for the amount of the estimate. Send requests and payment to the following address:</p>		
<p><small>The price for data from the Statewide Voter Registration System (SVRS) is \$25 plus \$5 per 1000 voters (rounded to the nearest thousand). The system is constantly updated, so it is necessary to query the system before a price for a file can be provided. The price for the entire state list is capped at \$12,500. Per §8.36(8), Stats., and Wisconsin Administration Code §GAB 3.50</small></p>		<p>Government Accountability Board Voter Data Requests 212 East Washington Avenue PO Box 7984 Madison, Wisconsin 53707-7984</p>



Listed below are commonly used SVRS reports and where you can locate instructions in the application manual for generating, filtering, sorting, and printing them. Also listed are definitions and help tips (*if any*) for each report.

Most Commonly Used SVRS Reports:

Report	Report Category and Definition	Helpful Tips (<i>if any</i>)	SVRS Application Manual
1. Voter Transfers Data Grid Report	SVRS data grid report generated from the Voter Transfer node. Report shows those voters that have moved to a new municipality and submitted a new registration application.	Should be generated regularly to track all voters who moved out of your jurisdiction.	See Voter , page 21; and Reports , page 3.
2. Merged Voter Information	SVRS report located in the Voter category. Report displays voter records that have been removed from your jurisdiction through the voter merge process in SVRS.	This report can be generated from both the municipal and county levels in SVRS.	See Voter , page 20.
3. Voter Listing	SVRS report located in the Voter category. Report returns a list of registered voters and addresses. It can include the voter's mailing address, ID Required, voter status, date registered, driver's license, social security number, and other info.	This report can be generated from both the municipal and county levels in SVRS.	See Voter , page 23; and Reports , page 22.
4. WI Voter Registration Batch List Report	SVRS report located in the Applications category. Report tracks the information entered into voter applications.	Designed for Providers to verify info of newly registered voters with Reliers.	See Voter Application , page 21.
5. WI HAVA Check Report	SVRS report located in the Voter category. Report tracks the HAVA check results for a municipality.	This report can be generated from both the municipal and county levels in SVRS.	See HAVA Interfaces , page 2.
6. WI Voter Match Report	SVRS report located in the Voter category.	Finds Duplicate Death & Felon Matches.	See HAVA Interfaces , page 9
7. District Combo Listing	SVRS report located in the Polling Place category. Report lists the district code for each district that makes up a district combination in SVRS.		See Districts and Offices Type , page 14.
8. Address Ranges by Address Range Type	SVRS report located in the Voter category. Report lists the address ranges in SVRS for a particular jurisdiction.		See Address Ranges , page 17.
9. Voters with No District Combination	SVRS report located in the Voter category. Report lists all voters whose district combination is equal to 1, whose residential address is not validated and who will not appear on the poll list.	Should be run before every election to ensure all voters appear on a poll list.	See Address Ranges , page 19.

Report	Report Category and Definition	Helpful Tips (if any)	SVRS Application Manual
10. Polling Place Listing	SVRS report located in the Polling Place category. Report generates a list of polling places for a municipality or county.		See Polling Places , page 6.
11. Vote Count by Voting Method	SVRS report located under the Elections category. Report shows the number of votes cast in an election, broken down by ward. Within each ward, shows whether the vote was recorded as being cast At the Polls, Absentee, or Other.	Report can be used to help reconcile vote counts recorded after an election.	See Post Election Activities , page 15
12. WI Voter Participation	SVRS report located in the Voter category. Report lists the name, address, ballot style description and ward for each voter who cast a vote in a particular election.	Report can be used for candidate data requests or to help reconcile vote counts recorded after an election.	See Post Election Activities , page 17; and Reports , page 27.
13. Canvass Reports	Reports generated from the GAB Canvass Reporting System		See Canvass .
14. Candidate Filing Reports	Generate to track nomination papers and ballot status of candidates in SVRS.	Required for State level candidates, optional for others.	See Election Setup .
15. Wisconsin Election Data Collection System (WEDCS)	Electronic form of the GAB-190 generated outside of the SVRS system.		See WEDCS , page 6.
16. Absentee Application Listing	SVRS report located in the Absentee category. Report lists absentee applications entered in SVRS by Election. Within each Election, applications are organized by Application Type.	Report can be used to manage Permanent Absentee voters who have not returned a ballot for a specific election.	See Absentee Applications .
17. WI Absentee Application Ballot Log	SVRS report located in the Absentee category. Report lists, by election, the Name of each Absentee Applicant, along with the Application Type, the Applicant's Address and Ward, when the Application was received, the Date Ballot Issued, the Date Ballot Returned, and the date the vote was recorded for that Applicant.	Report should be generated before an election and distributed to the polling place to help track absentee ballots on Election Day.	See Absentee Ballots .
18. Voter Listing With Districts	SVRS report located under the Voter category. Report shows the voters names and addresses, along with a list of the districts they live in.	Report can be used to verify both voter and district information.	See Reports , page 22.